

# COACH 2 EXCEL

Helping Others Do Great Work



LEARNING  
POINT  
GROUP

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# Overview

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## Coach 2 Excel



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# Overview

## Purpose and Objectives

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### Purpose

No one is in a better position to coach an individual than his or her direct supervisor. The question is whether the supervisor has the desire, skills, and tools to provide effective coaching.

This process will provide you with what you need to effectively coach your direct reports.

### Objectives:

This process will help you:

- 1 Set the context for successful coaching.
- 2 Create a long range plan with each person you intend to coach.
- 3 Hold regular one-on-one discussions with each person you are coaching to coach them toward successful completion of the plan.
- 4 Identify, diagnose, and address specific needs that you discover as you provide coaching.
5. Hold formal review discussions with those you coach to reach mutual understanding on progress made and lessons learned.

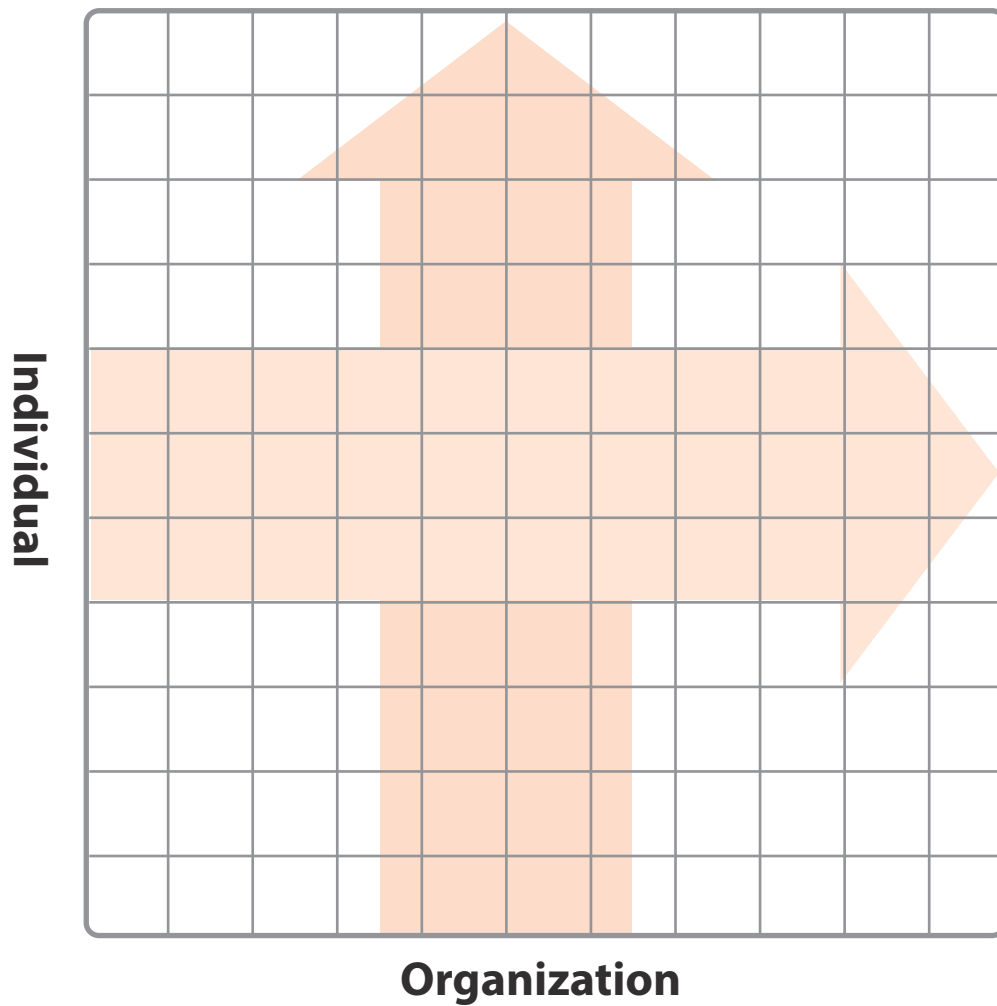


# Creating Success

## Balance of Needs

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**SUCCESS** = Performance + Satisfaction





# Ability & Motivation

## Key Factors

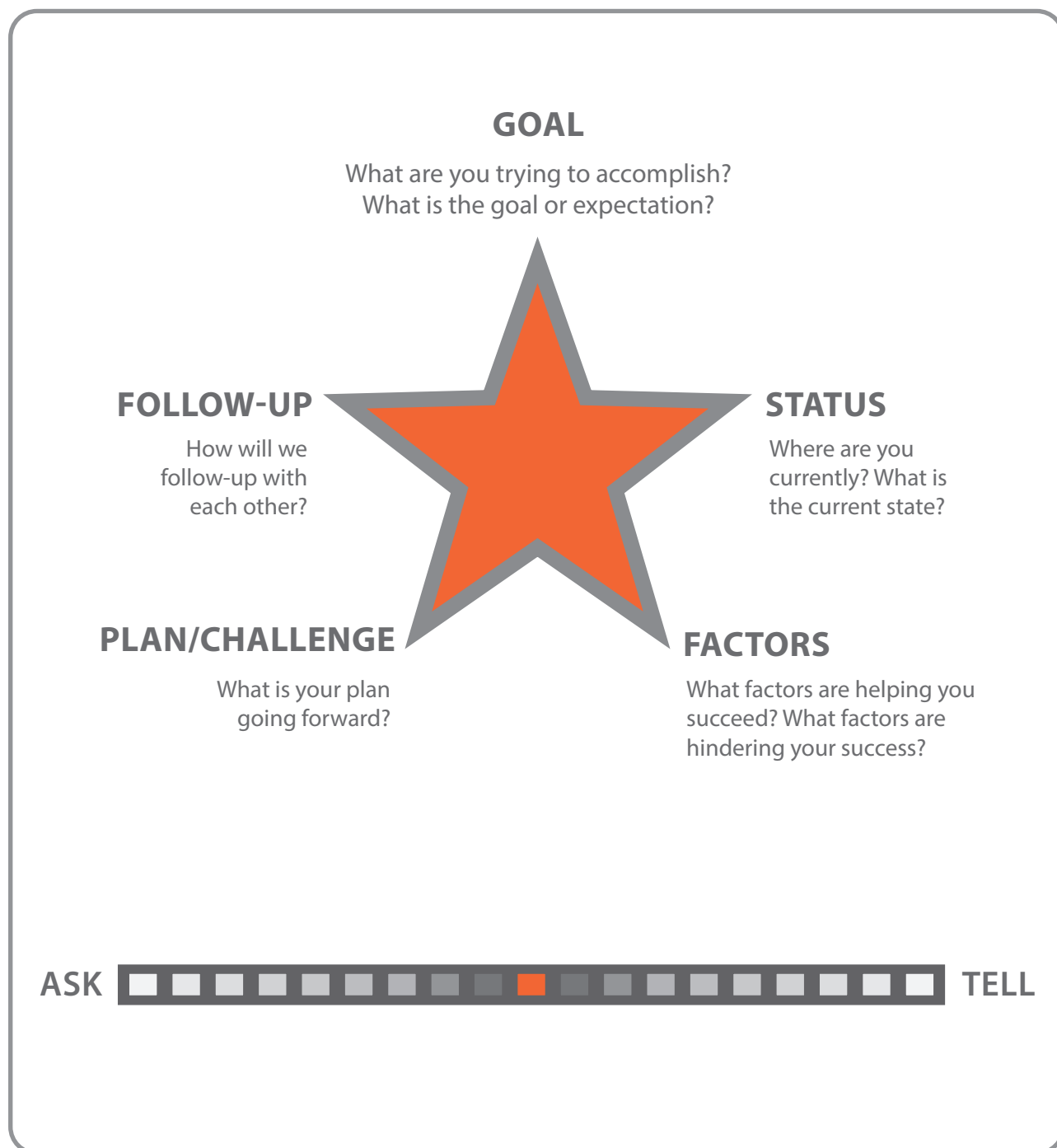






# Coaching Discussion

## Star Point Template





# Coaching Opportunity

## Waiting for You at Work

### Opportunity to Coach

- ▼ What opportunity do you have right now to coach someone to higher levels of performance?

Who:

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Goal (desired results or behavior):

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Status (current results or behavior):

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			H
RESULTS			
L			
	L	BEHAVIOR	H

			H
MOTIVATION			
L			
	L	ABILITY	H



# Coaching Opportunity

## Waiting for You at Work

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H		
RESULTS		
L		
	L	H
	BEHAVIOR	

H		
MOTIVATION		
L		
	L	H
	ABILITY	

# Workplace Coaching

## Key Principles

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1. Coaching is essential to individual, team, and workplace excellence.
2. Coaching is based on trust.
3. In most cases, people will appreciate good coaching.
4. People have a right to know how well they are doing.
5. Coaching must balance a concern for results with a concern for people.
6. Coaching is situational.
7. Coaching is not as much about putting excellence in as it is helping to get excellence out.

# Coaching Method

## Five Key Steps

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*“I never cease to be amazed at the power of the coaching process to draw out the skills or talent that was previously hidden within an individual, and which invariably finds a way to solve a problem previously thought unsolvable.”*

*John Russell, Managing Director,  
Harley-Davidson Europe Ltd.*

# Coaching Method

## Roadmap



Step	Key Actions	Tools
<b>1</b> <b>Set the Context for Coaching</b>	<ul style="list-style-type: none"> <li>a. Communicate your vision and philosophy.</li> <li>b. Clarify the process and roles.</li> <li>c. Build relationships of trust.</li> </ul>	Coaching Context Worksheet
<b>2</b> <b>Create the Plan</b>	<ul style="list-style-type: none"> <li>a. Clarify the role.</li> <li>b. Clarify the top priorities.</li> <li>c. Identify strengths and needs.</li> <li>d. Discuss and clarify the goals.</li> <li>e. Plan specific actions.</li> </ul>	Success Plan Worksheet
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# 1

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## Set the Context for Coaching



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# Coaching Method

## Roadmap



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# Step 1

## Set the Context for Coaching

### Overview

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## What and Why

Those you coach will need to know WHY you intend to coach them, WHAT will be involved, and HOW the coaching process will work. Ultimately, they will need to trust you and have the desire to be coached by you. Setting the context for coaching lays that foundation.

## How

The following key actions can help you set the context for coaching.

- a. Develop your vision and philosophy.
- b. Communicate how you intend to coach .
- c. Build relationships of trust.

1a

# Develop Your Vision and Philosophy

## Your Vision

What is your vision of what can be accomplished? How will coaching help achieve that vision?

1. In one simple statement, what does success look like? What is it that you see your team - and those you intend to coach - being able to accomplish?
2. Do you have a personal passion for achieving that success?
3. Is your vision of success consistent with the direction and priorities of your organization?
4. Does that vision or success draw upon the unique talents and strengths of your team?
5. Is it inclusive of your key stakeholders and their needs?
6. It is in alignment with what is expected of your team?
7. Does your vision inspire, does it unify, does it create focus?
8. Will it guide you in coaching and developing the right kind of leaders?
9. How will you communicate your vision to those you lead?

## Your Philosophy

What is your guiding philosophy in coaching your direct reports?

1. In your role as coach, what will others see you doing? What will your coaching look like?
2. How would you describe your role in helping your direct reports learn, grow, and succeed?
3. What is your basic belief about how people learn and grow?
4. How will you balance the need to coach people and the need to get product out the door?
5. How will coaching your direct reports impact key results (Safety, Quality, Production, Cost, and Morale)?
6. What steps will you take to continually develop yourself as an effective coach?
7. How will you adjust your style as a coach to meet the needs of the person you are coaching?
8. What should be the primary outcome of your coaching?
9. How will you communicate your philosophy to those you intend to coach?

# 1b Communicate How Your Intend to Coach

## The Process



- 1 \_\_\_\_\_
- 2 \_\_\_\_\_
- 3 \_\_\_\_\_
- 4 \_\_\_\_\_
- 5 \_\_\_\_\_

## Key Roles

Your Role as Coach

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The Role of Those You will Coach

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Support Roles

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The Role of Management and Your Coach

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1c

# Build Trust in Each Relationship

Assess each coaching relationship to ensure that trust is there to support effective coaching.

Trust Level	Assess Trust Factors	Take Action
At what level of trust is this relationship currently?	How well are we doing at each trust factor?	What is one thing I can do to build trust at this level?
<b>5 Success</b>	<input type="radio"/> Reinforcement <input type="radio"/> Results <input type="radio"/> Relevance	
<b>4 Capability</b>	<input type="radio"/> Synergy <input type="radio"/> Consistent Practices <input type="radio"/> Skill and Ability	
<b>3 Alignment</b>	<input type="radio"/> Balance <input type="radio"/> Unity <input type="radio"/> Clarity	
<b>2 Esteem</b>	<input type="radio"/> Empathy <input type="radio"/> Appreciation <input type="radio"/> Respect	
<b>1 Integrity</b>	<input type="radio"/> Transparency <input type="radio"/> Accountability <input type="radio"/> Honesty	

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# Worksheets

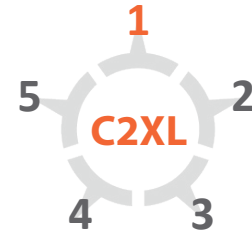
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# Coaching Context

## Worksheet



**Coach Name**

**Date**

### Why I Intend to Coach

My is my vision of success?

What are the desired outcomes of my coaching?

### How I Intend to Coach

What will you see me doing as a coach?

What will we be doing together?



### My Communication Plan

Who will I communicate to?	What will I communicate?	Desired Outcome	Target Date

### My Plan to Build Relationships of Trust

My Coaching Relationships	Trust Level	Key Actions to Build Relationship

# 2

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## Create the Plan



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# Coaching Method

## Roadmap



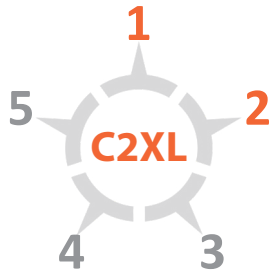
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# Step 2

## Create the Plan

### Overview

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## What and Why

The plan is both a document and a process. The process should clarify and align performance priorities and development goals. The plan sets a clear direction and roadmap for the coaching process. The plan typically spans a period of 12 months. It is intended to enhance, but not necessarily replace, the formal performance plan.

## How

The following key actions can help you create a plan for each person you coach.

- a. Discuss and clarify the role.
- b. Discuss and clarify top priorities.
- c. Identify strengths and needs.
- d. Discuss and clarify goals.
- e. Plan specific actions.

2a

# Clarify the Role

▶ **Write a brief, simple description of the associate’s role.**

- The first paragraph should provide a general description of the job or role.
- The second paragraph should describe the vision and/or unique contribution that the specific person can make within that role.

Describe the role in terms of what successful performance within the role will look like.

Utilize existing resources.

Discuss the role with the associate and make it personal to him or her.

Use your own words to describe the unique contribution that the person can make in that role.

▶ **General description.**

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▶ **Vision / Unique contribution.**

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# 2b Discuss and Clarify Top Priorities

▶ List the three to five most important **SUCCESS PRIORITIES**.

- What exactly does **SUCCESS** look like?
- What are your **PERFORMANCE PRIORITIES**? What are you expected to do?
- What are your **SATISFACTION PRIORITIES**? What do you most want to get out of your role and your efforts?
- **WHY** are these priorities important to your success.

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▶ List the **CRITICAL SKILLS** for the job or role.

- In order to achieve the priorities above, what do you need to be really good at? What are the **MOST IMPORTANT SKILLS** for your success?

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## Identify Strengths and Needs

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What are your **BIGGEST STRENGTHS**?

- Start with strengths that are also listed as **CRITICAL SKILLS**.
- Include your unique **TALENTS** or **ABILITIES**.
- **HOW** can each strength help you succeed?

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In what areas do you **NEED to LEARN or DEVELOP** the most?

- Which of the **CRITICAL SKILLS** do you need to get better at the most?
- What **BEHAVIORS** or **PRACTICES** do you need to improve?
- Are there any **GAPS** or **BLIND SPOTS** between how you see yourself and how others see you?

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# 2d Discuss and Clarify the Goals

▶ What will be your three to five **KEY GOALS**?

- Have you considered both **PERFORMANCE** (what you are expected to do) and **DEVELOPMENT** (what you most need to learn)?
- Is each goal **SMART**?
- Can you reasonably accomplish each goal within **12 MONTHS**?

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**S** - Specific  
**M** - Measurable  
**A** - Attainable  
**R** - Relevant  
**T** - Timebound

Goal



Outcome



Timeframe

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# Plan Specific Actions



What specific **ACTIONS** or **STEPS** will you take to achieve each goal?

- What will be the **SPECIFIC ACTIONS** that you will take?
- What will be the desired **OUTCOME** of each action?
- What will be the **TARGET DATE** for completion of each action?
- How will you **OWN** and **ACCOUNT** for the completion of each action?
- How will we **FOLLOW-UP** with each other and on what **FOLLOW-UP DATE**?
- What other things regarding **TIMING, SEQUENCING,** and **BUDGETING** do we need to consider?

<b>Goal:</b>			
	<b>Outcome</b>	<b>Target Date</b>	<b>Complete</b>
<b>Follow-up:</b>			

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# Worksheets

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# Success Plan

## Worksheet

**Name**

**Date**

**Role Description**

**Vision / Unique Contribution**

**Performance Priorities**

**Satisfaction Priorities**

**Relevant Strengths**

**Top Development Needs**

### Goals

Performance Goals	Outcome	Target Date Completion Date

Development Goals	Outcome	Target Date Completion Date



## Action Plan

Goal:			
Specific Actions	Outcome	Target Date	Complete
Follow-up:			

# 3

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## Coach to the Plan



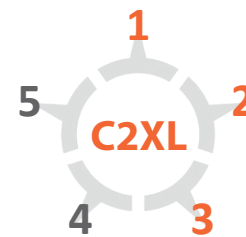
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# Coaching Method

## Roadmap



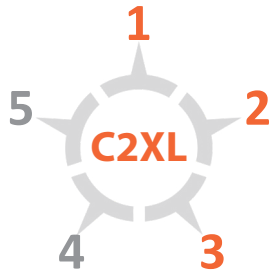
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# Step 3

## Coach to the Plan

### Overview

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## What and Why

To coach to the plan means to have regular interaction between you and your associate to ensure progress remains on track.

Regular contact, discussion, and observation are at the heart of good coaching. Daily contact provides the nudges that are necessary to keep the direction on course. 1-on-1 discussions are the heartbeat of the coaching process. Coaching challenges help focus capacity building. Verification provides clear and objective evidence of success.

## How

The following key actions can help you hold coach to the plan.

- a. Make daily contact.
- b. Hold 1 on 1 discussions.
- c. Issue coaching challenges.
- d. Verify success.

## 3a Make Daily Contact

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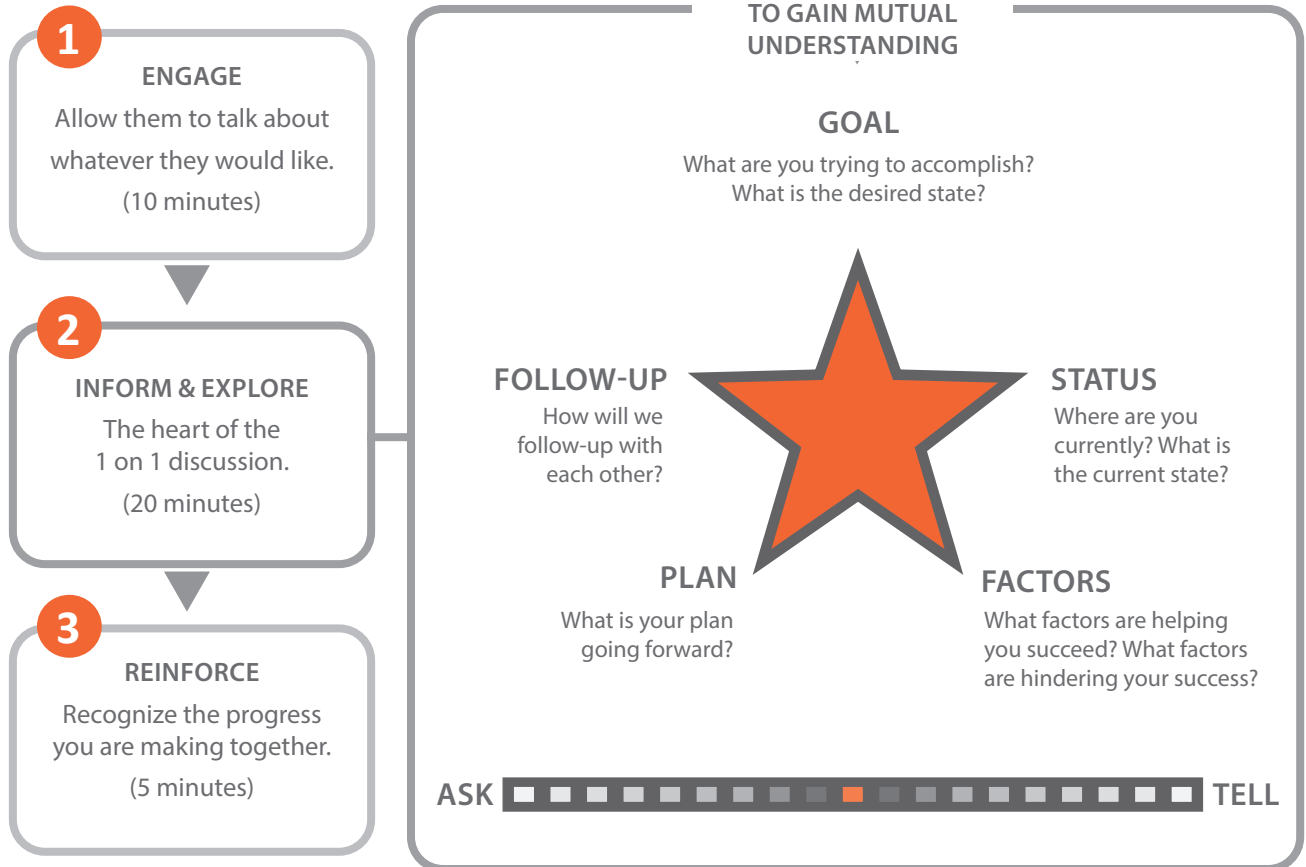


Daily contact is a brief, intentional interaction with each person you are coaching, each day.

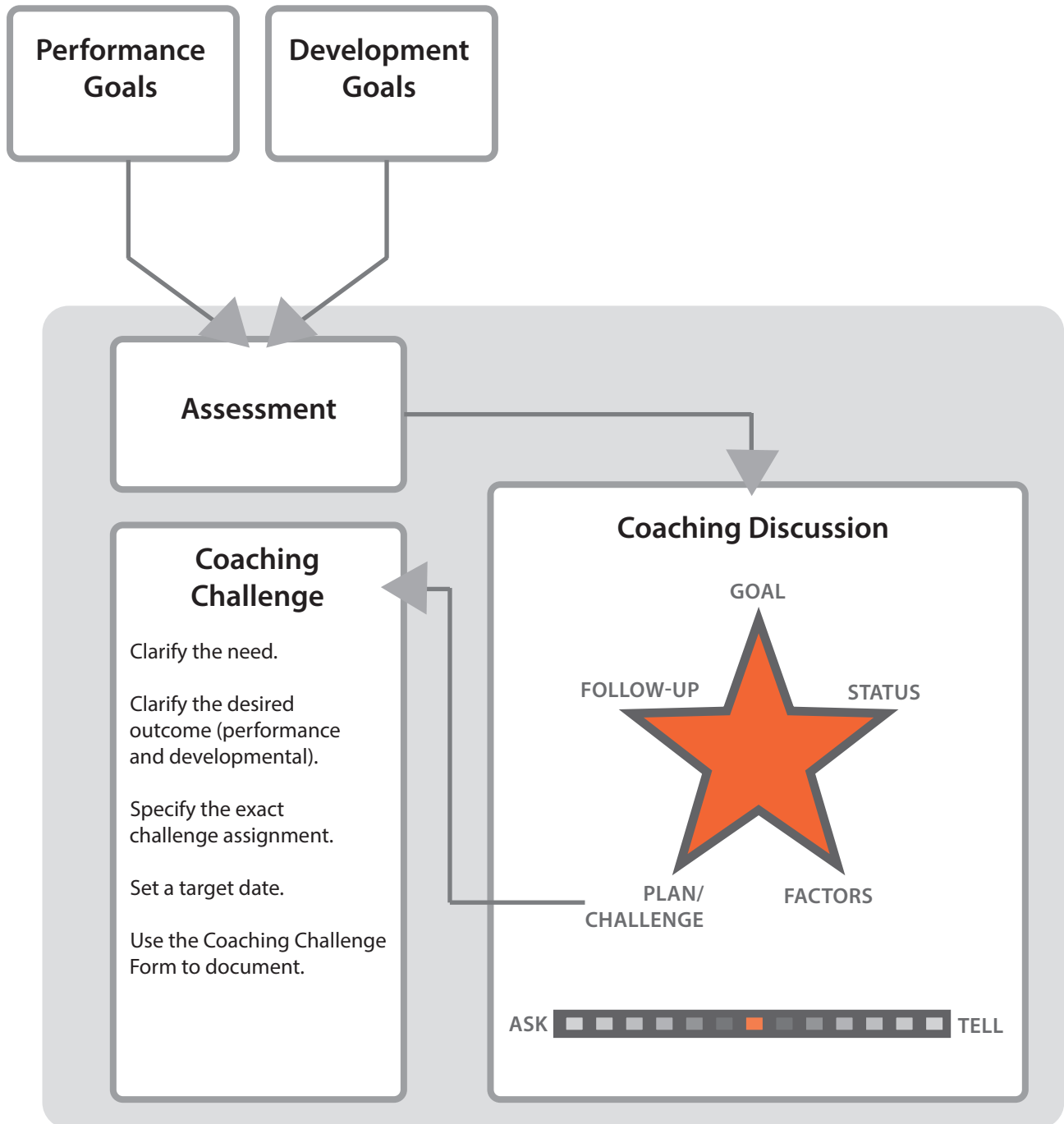
- If not daily, it should be very frequent. If not in person, it should happen by phone, text, or web discussion.
- Ideally, you will approach the person in their natural work environment.
- Observe the person as they work.
- Make eye contact with the person and engage the person in a brief, focused conversation.
- Ask the person how their day is going, what they are working on, and what is going well.
- Ask behavioral questions and follow-up questions.
- Catch them doing the right thing and reinforce it.

# 3b Hold 1-on-1 Discussions

- ▶ Your 1-on-1 discussions are the heartbeat of your coaching efforts.
- Schedule discussions in a strategic and consistent manner, then honor the schedule at all costs.
  - 30 to 45 minutes each week.
  - Expect the person you coach to come prepared and be accountable.
  - Ensure that discussions are focused, engaging, and productive.



# 3c Issue Coaching Challenges



## 3d Verify Success

▶ Provide support and verify progress made.

Go and see.

Gather evidence of progress and success.

▶ To **PROVIDE SUPPORT** means to take strategic action yourself to help ensure success.

- Encouragement.
- Tools.
- Training.
- Relevant Information.
- Promotion.
- Barrier busting.
- Environment.
- Praise.
- Other:

▶ To **VERIFY** means to gather relevant data (evidence) that tells you what progress is being made.

- Observation (go and see).
- Daily contact.
- Scoreboard.
- Individual scorecards and metrics.
- Feedback.
- Existing data and reports.
- Self-reporting by the person you are coaching.
- Other:



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# Worksheets

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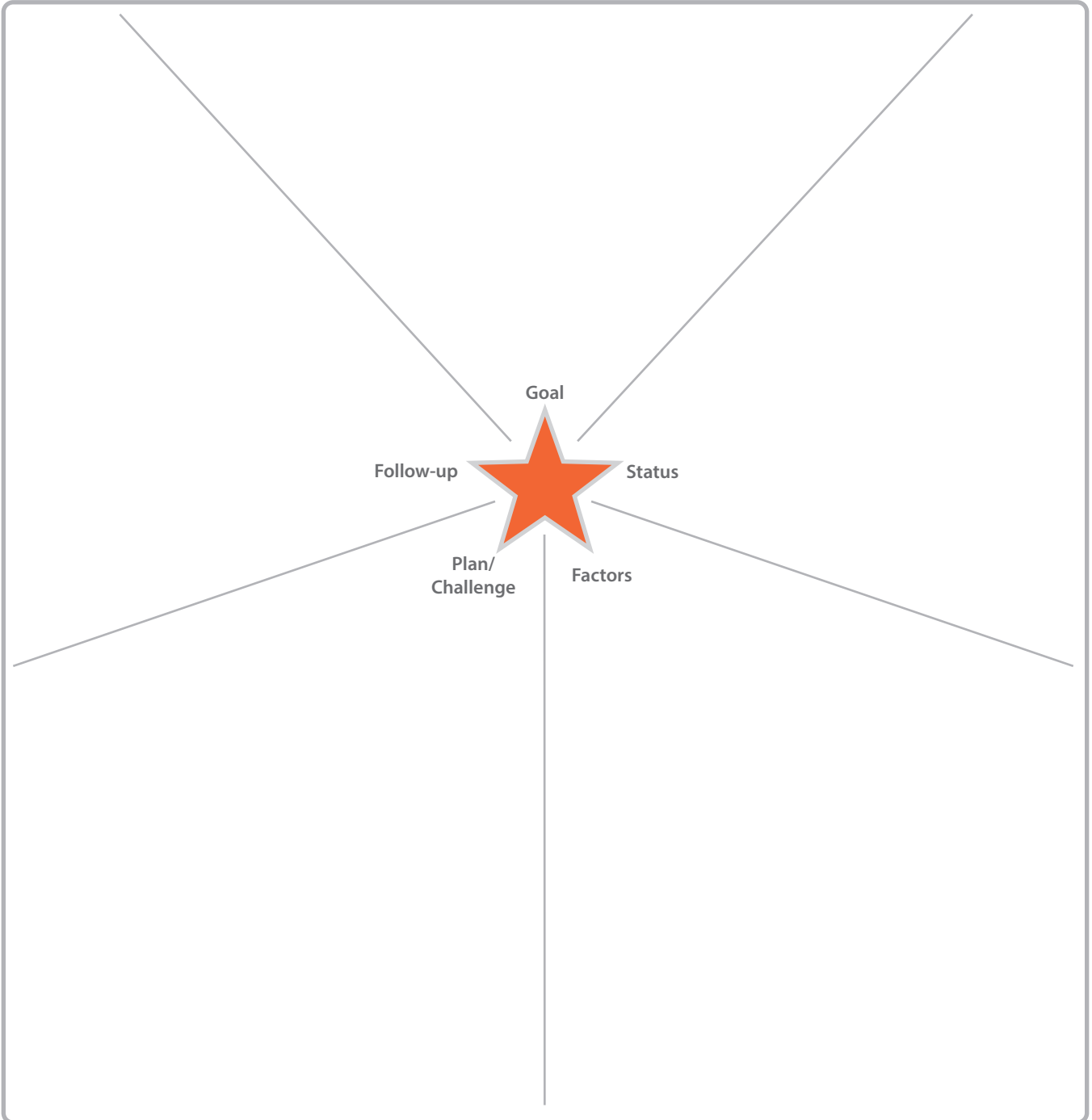




# 1 on 1 Discussion Template

Name

Date





# 1 on 1 Discussion Template

Name

Date



Goal	Status	Factors

## Plan / Challenge


## Follow-up




# 4

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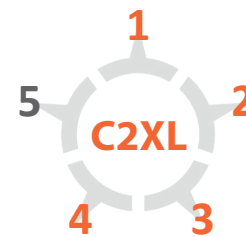
## Coach to the Need



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# Coaching Method Roadmap



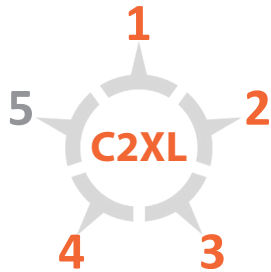
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# Step 4

## Coach to the Need

### Overview

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## What and Why

As you provide regular coaching (holding one-on-one discussions, issuing challenges, and following up to verify progress) you will inevitably uncover deeper, more significant developmental needs that will require your further attention. These needs typically stem from lack of AWARENESS, lack of ABILITY, or lack of MOTIVATION. This step helps you address these bigger coaching needs.

## How

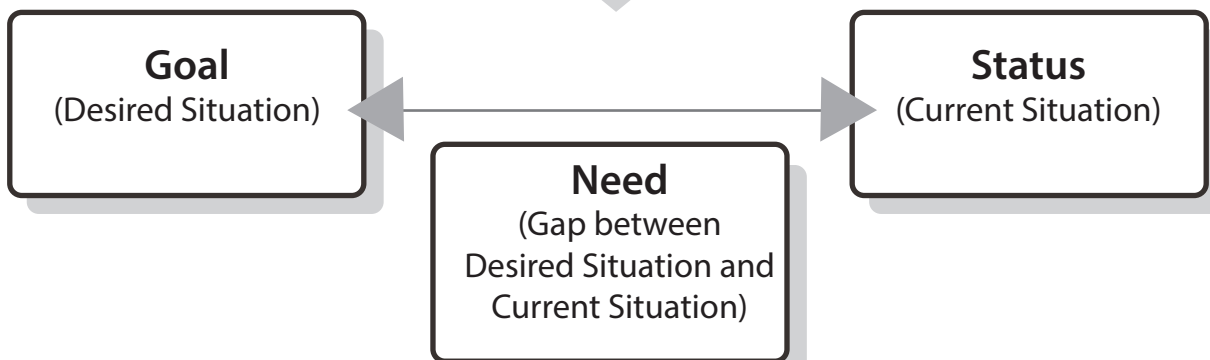
The following key actions can help you identify, diagnose, and address coaching needs.

- a. Identify and diagnose need.
- b. Match your approach to the need.
- c. Hold a more extensive coaching discussion.
- d. Sustain a conducive environment.

# 4a Identify and Diagnose the Need

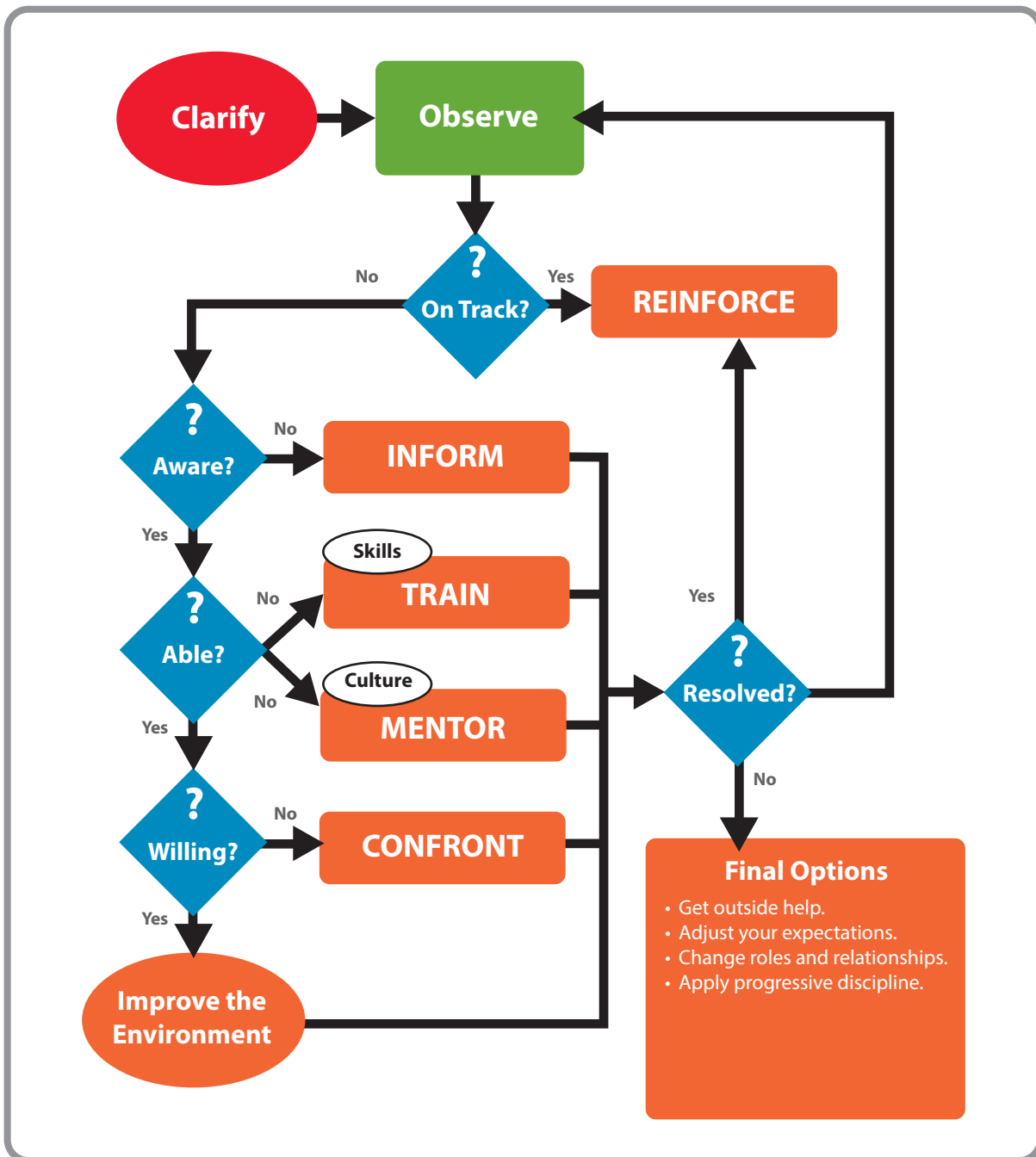


## Follow-up and Verify



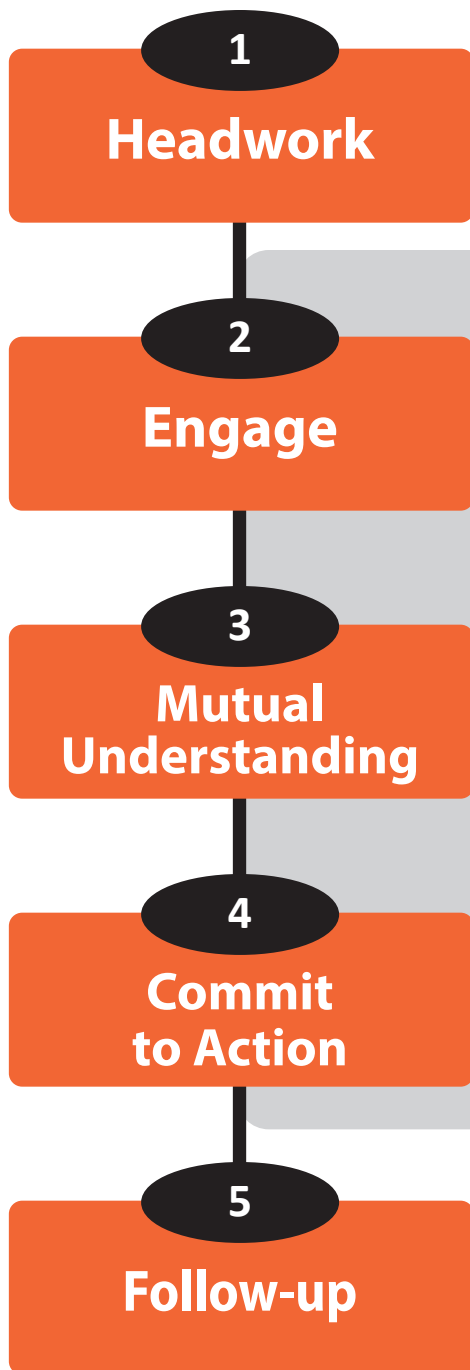
- Is the person **AWARE**?
- Is the person **ABLE**?
- Is the person **WILLING**?
- Is the environment **CONDUCTIVE**?

# 4b Match Your Approach to the Need





# 4c Hold a More Extensive Coaching Discussion





## Sustain a Conducive Environment



Your work as a coach may not always be focused solely on the person. Many times your work will include necessary improvements to the environment in which the person operates.

- *Is the job or task safe?*
- *Is the work area safe?*
- *Are the necessary tools and supplies accessible?*
- *Are all items situated for optimal work?*
- *Could automation help in any way?*
- *Is necessary information readily accessible?*
- *Are the expectations and authority to do the job clearly communicated?*
- *Have you heard all suggestions from those who work in the area?*
- *Other?*
- *Is the work in line with the values and priorities of the team and organization?*
- *Is the importance of the task clearly communicated?*
- *Is there a shared commitment between all team members to successfully accomplish the task?*
- *Is it socially acceptable to perform the task or is it risky in any way?*
- *Is there adequate support and cooperation from others?*
- *Does performing the task produce any type of negative consequences to the person performing it?*
- *Have you heard all suggestions from those who work in the area?*
- *Other:*



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# Worksheets

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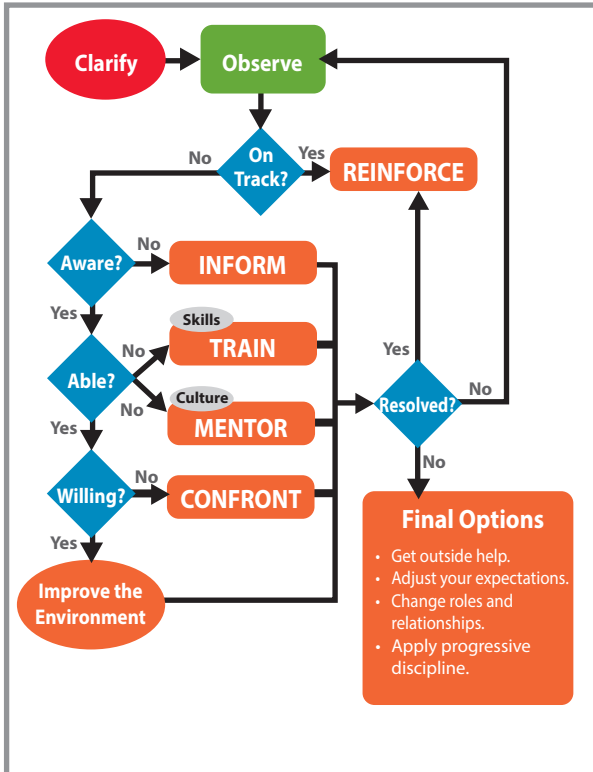


# Coach to the Need

## Worksheet

### 1 Headwork - Diagnose

Desired Situation (Goal)	Current Situation (Status)
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Individual Ability	Individual Motivation
Environmental Ability	Environmental Motivation

Match Your Approach to the Need:

<input type="radio"/> REINFORCE	<input type="radio"/> ENVIRONMENT
<input type="radio"/> INFORM	
<input type="radio"/> TRAIN	<input type="radio"/> FINAL OPTIONS
<input type="radio"/> MENTOR	
<input type="radio"/> CONFRONT	

Adjust Your Style to the Need:

- 1 - "I Decide"
- 2 - "Let's Talk, I Decide"
- 3 - "Let's Talk, Let's Decide"
- 4 - "Let's Talk, You Decide"
- 5 - "You Decide"



# Coach to the Need

## Worksheet

### 2 Engage

- Set the tone.
- Clarify purpose & outcome.
- Establish the process.
- Keep it focused, safe, productive.

	Purpose	Outcome
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### 3 Mutual Understanding



- Reclarify the purpose
- Discuss Goal, Status, Factors, Plan, and Follow-up
- Explore (ask, listen, reflect, check)
- Inform (describe what you see and the impact)
- Summarize

	Goal	Status
	Factors	

### 4 Commit to Action

- Transition to action planning
- Get commitment on key actions, outcomes, and deadline.
- Set a follow-up date

	Plan / Challenge
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### 5 Follow-up

- Build the relationship
- Ensure accountability
- Hold follow-up
- Learn from the experience

Follow-up Date	Follow-up Notes
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# 5

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## Review Success

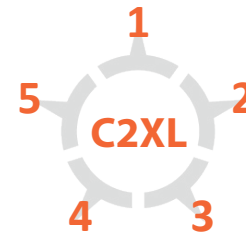


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# Coaching Method Roadmap



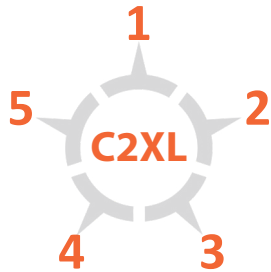
Step	Key Actions	Tools
<p><b>1</b> Set the Context for Coaching</p>	<ul style="list-style-type: none"> <li>a. Develop your vision and philosophy.</li> <li>b. Communicate how you intend to coach.</li> <li>c. Build relationships of trust.</li> </ul>	Coaching Context Worksheet
<p><b>2</b> Create the Plan</p>	<ul style="list-style-type: none"> <li>a. Clarify the role.</li> <li>b. Clarify the top priorities.</li> <li>c. Identify strengths and needs.</li> <li>d. Discuss and clarify the goals.</li> <li>e. Plan specific actions.</li> </ul>	Success Plan Worksheet
<p><b>3</b> Coach to the Plan</p>	<ul style="list-style-type: none"> <li>a. Make daily contact.</li> <li>b. Hold 1-on-1 discussions.</li> <li>c. Issue Coaching Challenges.</li> <li>d. Verify success.</li> </ul>	Coaching Discussion Template Coaching Challenge Form Verification Tools
<p><b>4</b> Coach to the Need</p>	<ul style="list-style-type: none"> <li>a. Identify and diagnose the need.</li> <li>b. Match your approach.</li> <li>c. Hold an in-depth discussion.</li> <li>d. Sustain a conducive environment.</li> </ul>	Coaching Roadmap Coaching Discussion Template
<p><b>5</b> Review Success</p>	<ul style="list-style-type: none"> <li>a. Review progress toward goals.</li> <li>b. Reinforce desired performance and development.</li> <li>c. Realign focus and effort.</li> <li>d. Renew commitment to the process.</li> </ul>	Review Discussion Template

# Step 5

## Review Success

### Overview

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## What and Why

The purpose of the review is to strategically and holistically assess, discuss, summarize, and document progress toward the goals on the plan. Whereas coaching conversations happen on a frequent basis, and each conversation may be focused on one specific thing, formal review discussions happen less frequently (at least yearly but possibly even quarterly) and should cover the entire breadth of the plan. The review should be a summary of progress made toward the plan and not a surprise to either person. A formal record is often kept.

## How

The following key actions can help you identify, diagnose, and address coaching needs.

- a. Review progress toward goals.
- b. Reinforce desired actions and efforts.
- c. Realign specific priorities, goals, and actions.
- d. Renew commitment to the coaching process.

# 5a Review

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## Objective

Gain a common understanding of the progress that has been made toward the established plan and the lessons learned along the way.

## Questions to Ask

1. How are you feeling about the original SUCCESS PLAN?
2. What meaningful DATA and EVIDENCE do we have that tells us what kind of progress has been made?
3. What specifically were the GOALS and what is the STATUS in meeting each of the goals?
4. What FACTORS have helped and hindered your success in reaching the goals? What has gone well? What have been the challenges?
5. What has been LEARNED along the way?

## Things to Do

- Schedule time in advance to hold the review discussion.
- Secure an appropriate location for holding the actual review discussion.
- Gather relevant data and evidence and prepare adequately for the review discussion.
- Hold a collaborative review discussion where you jointly reflect on the questions above.
- Be sure to summarize and document the key findings.

# 5b Reinforce

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## Objective

Recognize and reinforce the desired results and actions that have led to desired progress. When you reinforce something, you make it stronger.

## Questions to Ask

1. What specific ACTIONS and EFFORTS have led to desired results and desired success?
2. What is the specific IMPACT and CONSEQUENCES of those actions and efforts?
3. How can you make sure that those actions and efforts can be REPEATED?
4. How can the successes be SHARED with others?
5. What specific actions and efforts need to be STRENGTHENED or IMPROVED? How can we do that?

## Things to Do

- Describe the specific actions and efforts that you have observed.
- Describe the specific impact and consequences of those actions and efforts.
- Ask for and listen to the other person's views.
- Create a list of successes to share with others.
- Create a list of needs and improvements.
- Take notes and document as necessary.



## Realign

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### Objective

Realign specific goals and actions to current needs and priorities.

### Questions to Ask

1. Are the original goals still relevant and important?
2. Do adjustments need to be made to priorities, goals, and actions?
3. Do we have a positive and accurate perspective of success going forward?
4. Do we need to adjust our focus or emphasis?
5. Are we clearly aware of actions that have hindered success?
6. Are we clear on what needs to happen next and are we unified in making that happen?

### Things to Do

- Clarify current team and organizational priorities.
- Openly discuss disconnects or misunderstandings that could get in the way of future progress.
- Revise measurable goals as is necessary.
- Summarize and check for understanding.
- Take notes and document as necessary.



# Renew

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## Objective

Renew commitment to the current success plan and the coaching process going forward.

## Questions to Ask

1. Are we both committed to the new success plan?
2. What support and resources are needed?
3. Are we both committed to the coaching process?
4. Are we clear on our roles and how we each can contribute to success?

## Things to Do

- Summarize the success plan going forward.
- Ask for and listen to your associate's commitment to the plan and the coaching process.
- Ask for feedback on the coaching that you have been providing.
- Make commitments for going forward.



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# Worksheets

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# Reinforce

Key Strengths and Successes

# Realign

Clarify or Modify Priorities

# Renew

Commitment Forward

Review Date

Associate

Coach